Request for Proposals

For a
Computerized Maintenance Management System

May 27, 2003

Preface

The City of San Bruno (City) is issuing, and soliciting responses to, this Request For Proposals (RFP). Suppliers receiving this document are under no obligation to respond, but are requested to return it to the City once the decision has been made not to respond. If a response is to be made, all supplier costs associated with this RFP and the response are the sole obligation of the supplier. City is not responsible for any costs or other obligations incurred or committed to by the supplier related to this RFP or the response.

The information contained in this document is considered confidential and the exclusive property of the City. The contents shall not be copied or provided to any other party without the express written consent of City's Purchasing Representative identified herein. Permission to copy this material or any portion thereof is hereby granted to suppliers for their exclusive use in responding to this RFP.

Acceptance of this RFP acknowledges consent by the supplier to the above terms and conditions.
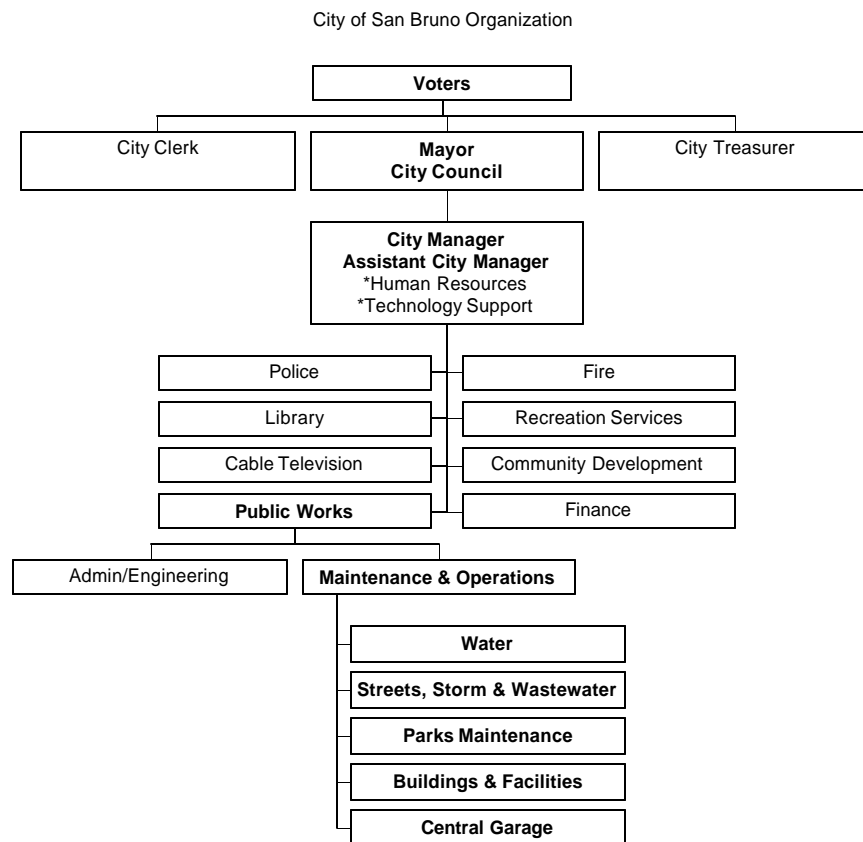
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Section 1

Overview
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Introduction

The City of San Bruno (City) is a general law municipality incorporated under the laws of the state of California. An organization chart is shown below. The City's Public Works Maintenance and Operations consists of five divisions located in two Corporation Yards within the city. We are seeking a Computerized Maintenance Management System that will be implemented in at least three of those divisions. An implementation plan for the new system will be developed once the solution has been selected.

City of San Bruno Organization

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    │  City Clerk  │      │    Mayor     │      │City Treasurer│
    │              │      │ City Council │      │              │
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                          │   City Manager   │
                          │Assistant City Mgr│
                          │ *Human Resources │
                          │*Technology Support│
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        │     Police       │──┤──│         Fire           │
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        │     Library      │──┤──│   Recreation Services  │
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        │ Cable Television │──┤──│ Community Development   │
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        │  Public Works    │──┘  │        Finance         │
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      │ Admin/Engineering│ │Maintenance & Operations│
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                    ┌──────────────────────────────┐
                    │            Water             │
                    ├──────────────────────────────┤
                    │ Streets, Storm & Wastewater  │
                    ├──────────────────────────────┤
                    │       Parks Maintenance      │
                    ├──────────────────────────────┤
                    │    Buildings & Facilities    │
                    ├──────────────────────────────┤
                    │        Central Garage        │
                    └──────────────────────────────┘
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We are requiring a written proposal; a follow-up demonstration may be required so that we can understand the extent and nature of your system. Not all vendors responding to this RFP will be asked to provide a demonstration. All responses will be kept confidential until a final selection has been made.

Project History

The City's Public Works Maintenance and Operations functions have gone through substantial changes in recent years. Reorganization of City departments in 2000 added the Parks Maintenance and Buildings & Facilities divisions to these functions. Positions have been added and responsibilities changed over the past two budget cycles. A new Deputy Public Works Director for Maintenance and Operations assumed his position in 2001. The need for better management of information within the divisions, as well as external demands for service records and performance measures (from the public, the City Manager's office and Public Works Administration) have necessitated the development of better systems for recording and tracking maintenance and operations activities.

Only the Central Garage currently utilizes a computerized maintenance database. The other divisions use a variety of tracking systems, including paper records and Excel spreadsheets. The City is seeking a single maintenance tracking, scheduling and reporting system which will accommodate the needs of the Water, Parks Maintenance, and Streets, Storm & Wastewater divisions and, if possible, the Buildings & Facilities division. Additional desirable qualities for the proposed solution include the ability to interface with a wide variety of other computerized databases (including the system currently utilized by the Central Garage) and future capability to expand into an Enterprise Asset Management system.

The City Maintenance and Operations team is focused on maintenance activities (and associated work steps) that are essential to providing the public with quality streets, vital utilities, safe recreational spaces, and beautiful landscaping, as well as providing other city departments with effective fleet and facility services. Specifically, the scope of the City Maintenance and Operations team includes the following core maintenance processes:

- Responding to customer queries and complaints
- Preventive scheduling and performing preventative maintenance
- Inspecting equipment to determine its condition
- Correcting any problems that are identified
- Predicting possible failures based on equipment history, observed condition and predicted operation
- Inspection

System Objectives and Scope of the Project

Key Capability Objectives
- Tracking of service requests
- Creation of work orders
- Scheduling of work
- Reporting of work completed
- Maintenance of asset inventory
- Tracking of time spent on service requests
- Association of cost data with services

Key Benefits Expected

- ▪ Better customer service
- ▪ Standardized format for work orders
- ▪ More efficient use of labor
- ▪ Increased accountability for work performance
- ▪ Better control of inventory
- ▪ Easier budget preparation

City Mission/Vision Statements

The City of San Bruno exists to provide exemplary services for our community that enhance and protect the quality of life.

<u>Public Works Department Mission Statement:</u> To provide the citizens of San Bruno, their elected representatives and our fellow City employees with rapid, professional and cost-effective Public Works services. Our interaction will always be courteous, productive and beneficial to our clients. We will continually strive to create a Public Works Department that sets an example of excellence in public service.

<u>Vision:</u> San Bruno will be the Peninsula City of choice in which to live, learn, work, shop and play.

Existing Conditions

This section provides the technical and operating environment that exists in the City's sites today.

City's Technical Environment

The City of San Bruno (City) has an implementation Citrix MetaFrame XP running on Windows 2000 Terminal Server Edition (TSE).

Currently the City has approximately 320 users that have access to the MetaFrame server farm. Average concurrent user load is approximately 90 connections. The City anticipates the concurrent user load to grow to 100 users over the next year. The City currently deploys a server desktop via Microsoft Terminal Server and Citrix MetaFrame to Windows 2000 workstations (<20%), Windows 95/98 workstations (40%) and Maxspeed WinTerms (40%).

The current users access the MetaFrame environment through the LAN and the ATM WAN over TCP/IP. The users in remote offices access the environment through the Internet via the local cable TV, and home office users will access via their ISP provider, both over TCP/IP.

Application Testing:

The City has a standard testing methodology in place for our Terminal Server environment. The process consists of:

- ✓ Researching the application's Terminal Server compatibility (also prospective vendor's responsibility) before signed purchase agreement. Written guarantees and remedies are written into the contract with City Attorney's guidance.

✓ Have 5 test users evaluate the application for one week, and 15 users for one additional week.

✓ Implementing a testing methodology that includes predefined testing criteria, performance monitoring, expected results, documented results and end-user acceptance testing.

✓ If no problems arise application is then rolled into production.

For information on Citrix MetaFrame architecture visit: http://citrix.com/products/

For questions about City's technical environment, contact:
Eric Jackson, Information Technology Analyst II
City of San Bruno
567 El Camino Real
San Bruno, CA 94066

650 616 7077 direct
650 742 6515 fax
ejackson@ci.sanbruno.ca.us

City's Operating and Maintenance Environment

Each of the City's divisions has its own maintenance personnel, orders its own equipment and maintains a separate inventory. Although the divisions operate independently, there are some opportunities for interdivisional equipment sharing.

The City's Parks Maintenance and Buildings & Facilities divisions operate out of a Corporation Yard adjacent to the main City Park at Crystal Springs Road and Cypress Avenue in San Bruno. The office staff at this location normally consists of the Parks Services Manager, two Field Supervisors, the Buildings & Facilities Services Manager and two part-time clerical personnel. The Parks maintenance staff of 16 is organized into eight field crews. The Buildings & Facilities staff consists of a Custodial Services Leader and seven custodians assigned to various facilities throughout the City.

The three other Maintenance and Operations divisions are housed at a Corporation Yard at San Felipe and Huntington Avenues. The Water division consists of a Manager, a Field Supervisor, and nine field personnel, organized into crews based on daily maintenance needs. The Streets, Storm & Wastewater division employs a Manager, two Field Supervisor, and 18 field personnel. As with Water, this division operates rotating crews assigned according to need. The Central Garage is staffed by a Garage Services Manager and two mechanics. In addition, two clerical workers and a staff engineer support these three divisions and the Deputy Director.

The selected Maintenance Management solution will provide access to the office personnel at the sites listed above, as well as the Public Works Director, Management Analyst and Assistant City Manager located at City Hall. The number of concurrent users anticipated is 10.

Section 2

Instructions to Vendors

This section contains the information required to submit a responsive proposal. Vendors are encouraged to read this section carefully. Submittals should be prepared economically and concisely, with material included by reference only as necessary.

Written Proposals

Please have your proposal delivered to us no later than **Friday, June 27, 2003**. All questions regarding this Request for Proposal should be directed to Phillip Hanes, Management Analyst, via electronic mail to phanes@ci.sanbruno.ca.us. Questions will only be entertained if received prior to 5:00 p.m. Pacific Daylight Time on Monday, June 23.

Please address your proposal to:

> San Bruno Public Works Department
> Attn: Phillip Hanes
> 567 El Camino Real
> San Bruno, CA 94066

Proposals may be modified or withdrawn prior to 5:00 p.m. on Friday, June 27, 2003, by an authorized representative of the vendor.

Proposals submitted will become property of the City after the proposal submission deadline, and will be subject to disclosure to other parties following final selection of a vendor or rejection of all proposals by the City. The City will not pay any costs associated with preparation of proposals or other participation in the response to this RFP.

Submission of a proposal in response to this RFP obligates the vendor to negotiate in good faith with the City to conclude an agreement for purchase and installation of a software system. Note that the selected vendor will be required to abide by the City's requirements for contracting, including possession of appropriate insurance, non-discrimination, and other requirements under California law. See sample contract attached.

Schedule of Events

The tentative schedule for completing the evaluation process is:

Date	Event
May 27, 2003	Release of Request for Proposal
June 27, 2003	Written proposals due

July 10-15, 2003	System demonstrations
Aug. 8, 2003	Final selection

This schedule is subject to change. The City reserves the right to reject any and all proposals or any part of any proposal, to waive minor informalities or technicalities, or to solicit new proposals on the same project or on a modified project which may include portions of the originally proposed project as we may deem necessary in our interest.

Proposal Format and Content

You should deliver an unbound original plus five (5) separately bound copies of your proposal to the above address. **Failure to follow the prescribed format may result in rejection of the proposal as non-responsive.**

The written proposal should be organized into eight sections as specified below:

- **Section 1. Executive Summary.** This section should present an introduction to the technology response and a summary of the vendor qualifications and ability to meet the City's overall requirements. All information needed to convey an executive overview of the response should be included. Emphasis should be placed on clarity, brevity and directness in organizing this section.

- **Section 2. System Description** – Please give a general description of your system's capabilities, including hardware and operating system expectations. What separates your company from your competition? Why should the City select your system? Please provide information on reports and screen shots of your software package.

- **Section 3. Support Services** – Please indicate the level and nature of support you are prepared to provide in the following areas:

  - Package modifications and customization
  - Installation
  - Testing
  - Documentation
  - Staff training
  - Problem resolution
  - Ongoing system maintenance
  - User groups
  - Other (specify)

- **Section 4. Responses to Functionality Questions** – Please complete the functionality questionnaire included with this RFP.   Follow the directions

provided, and make your responses as accurate and thorough as possible within the space provided.

- **Section 5. Proposed Implementation Plan** – Please propose an implementation plan for the project that includes the following, at a minimum:

  - A technical approach outlining how you envision the project to be administered

  - A discussion of the methodology you will use, including your project management approach and communication tools

  - A schedule of project steps and anticipated time frames

  - Resumes of proposed project team members and a discussion of what roles each member of the team would assume.

  - A discussion on the resources City will be required to provide.

  - Training

  - An overview of the professional services you offer that are necessary to implement this system

- **Section 6. Costs and Contract Terms** – Please itemize your costs for this project, including the costs of your software package, typical implementation costs, and the costs for other support services you might provide. What are your annual maintenance costs, and what services are provided? If any of your costs are on a time and expense basis, please prepare estimates based on your past experience. Please submit a copy of your standard maintenance agreement.

- **Section 7. Vendor Background** – This section should be a summary of your qualifications for the project, including:

  - Describe your company and its business philosophy.

  - Who owns your company and are there any impending changes in ownership?

  - How many employees do you have? Please categorize by their functional area (development, support, sales, administration, etc.).

  - How many systems have you sold and successfully installed?

  - Describe previous projects of this nature.

– Provide a list of client references for your system. Please emphasize municipalities that have successfully installed your system in northern California.

– Include any additional information you believe would be helpful to us in making a selection.

▪ **Section 8. Appendix –** Include any material referenced throughout the document in this section. References must be made accurately.

System Demonstrations

Your follow-up demonstration will help us answer questions, clarify any misinterpretations, and obtain all the data needed for our evaluations. It should cover the questionnaire responses included in your written proposal. Your demonstration need not cover the questions in the order listed in the questionnaire as long as you reference them during the course of your demonstration.

Demonstrations by selected vendors will be scheduled to take place between March 24 and March 28 in our office. If selected, you will be contacted to schedule a formal demonstration of your system.

Please allow up to four hours for your demonstration and questions from those in attendance. The City will notify those vendors not selected.

The City will not be responsible for any costs associated with the preparation and delivery of written or oral presentations.

Selection Criteria

The lowest cost proposal will not necessarily be selected as the appropriate solution for the City's needs. The most important part of our evaluation will be the ability of your system to meet our requirements. The selection decision will be largely based on your answers to the items listed in the questionnaire, and to the responses contained in this proposal. Your system demonstration will also receive much consideration. Other criteria include:

- Flexibility of system
- Cost of your system
- Experience of personnel
- Reputation
- Stability
- Experience with similar installations
- Training
- Maintenance terms and expected annual costs
- Ongoing support
- Commitment to technological improvement

Section 3
Required Submittals

The following pages contain the functionality questionnaire requested as the proposal's Section 4 submittal. Please complete the questionnaire according to the directions provided.

Functionality Questionnaire

Directions: For each of the following requirements, indicate whether the solution you are proposing meets the requirement or not, and any relevant comments. If the system meets the requirement only with modification, this must be noted under comments.

REQUIREMENT	MEETS	DOES NOT MEET	COMMENTS
The system offers an automated method to manage a user's Work Management requirements within one system without the need to purchase separate system features. At minimum, the system will include the ability to create preventive maintenance schedules, create inspection and test types, manage various types of work orders, record customer service and problem information and create user-defined reports from within the system.			
The system uses an industry standard database management system such as Microsoft Access or Microsoft SQL Server. Note version under comments.			
Vendor offers an Annual Service and Maintenance Agreement that includes future system upgrades as well as telephone customer support.			
The system provides users with the ability to send work orders via electronic mail using Microsoft Outlook e-mail.			
The system includes the capability to transfer data to and from handheld computers or personal digital assistants for use in field inspections.			
The system includes security features that allow the administrator to restrict access to fields and functions within the system to specific users.			
The system can be customized by each individual user to display or hide fields as desired.			
Help screens are accessible from			

within the system.			
REQUIREMENT	**MEETS**	**DOES NOT MEET**	**COMMENTS**
The work order feature allows the creation of scheduled, unscheduled, preventative maintenance or any user-defined work order type.			
The system has the ability to display work orders (open and closed) by date range, number range, priority, type, crew assignment, or other user-specified field.			
The system has the ability to print an individual work order, a group or all selected work orders.			
The system allows a work order to be created without being attached to any asset or address.			
The system allows the user to complete a group of selected work orders at one time.			
The system automates the creation of scheduled work orders based on any required elapsed period of time or user-defined schedule such as mileage or hours.			
The system allows the user to specify a combination of scheduling criteria, such as a number of miles or a period of time, whichever comes first.			
The system allows the user to specify one or more time periods during which the scheduled work orders should not be generated. The user can specify that these dates be enforced every year.			
The system allows the user to define work order templates to avoid repetitive data entry.			
The system has the ability to add and update inventory asset types as defined by the user without modification to the software.			
The system allows the user to print single or multiple inventory records.			
The asset inventory feature allows for the manual or automatic entry of usage information, and can be linked			

to the scheduled work order feature for generation of pre-defined work orders.			
REQUIREMENT	**MEETS**	**DOES NOT MEET**	**COMMENTS**
The asset inventory feature allows for the entry of parts information relating to a particular asset inventory item.			
The system allows the user to attach notes to asset inventory items that will be displayed on all work orders associated with the specified asset inventory item.			
The system allows the user to link asset inventory items to one another in a parent-child relationship, creating a hierarchy of related asset inventory items.			
The system allows establishment of history records by customer and can link work order records to customer call records.			
The system allows multiple problems, addresses and contacts to be associated with a single work order.			
The system allows the user to associate inspection, work order, customer information and problem information with an address.			
The system allows the user to select an address and display all information attached to the selected address.			
The system allows the user to define cost categories and associate costs with work orders or inventory asset items.			
The system allows the user to create customized reports.			
The system allows the user to attach multimedia files to records within the system.			

Directions: Answer each of the following questions within the space provided.

1.   Is your proposed maintenance management system a module (or modules) of a complete
        Enterprise Asset Management (EAM) system that can be purchased later? If yes, please
        explain the relationship of the maintenance management component to other pieces of the
        EAM. If no, please explain how you would interface your solution to an EAM.

2.   Please give an example, with contact information, for a current installation of your
        proposed solution in a Citrix MetaFrame environment.

3.   What modifications would be necessary for your system to accommodate facilities
        management as well as other maintenance activities?

4.   Please describe how your solution could interface with each of the following systems:

    a.   Geographic Information Systems (GIS)

    b.   Enterprise Resource Planning (ERP) or Financial Information Systems

    c.   Customer Relationship Management (CRM) systems

    d.   Supervisory Control and Data Acquisition (SCADA) systems

    e.   Fleet Management systems

      f.   Project Management software such as Primavera or MS Project

      g.   Public agency Permitting systems

5.   Does your solution provide the capability to rate the severity of maintenance needs?